

FIGURE 1A

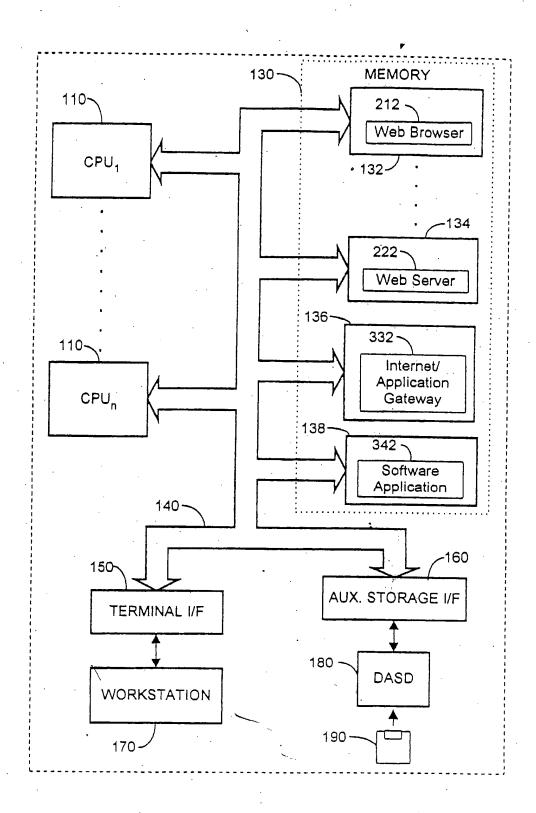


FIGURE 1B

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SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Login	ſ
Introduction	
<u>Jobs</u>	
News	
Documentation	
FAQ	

<u>Help</u>

Enter your login information and push the Login button. You must have a valid user name and password to access the system!

User Name: insurance Password: **** Login

Authorized access only!

Do NOT give your user information to ANYONE!

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This is the login page. In order to use Surety2000 you must receive a user name and password from Surety2000. At least one participating surety must authorize you first. Then Surety2000 will give you the necessary user and password.

For purposes of this presentation we will use the user name "insurance" and password "john" After the user name and password are inserted you will click on "login".

FIGURE 1C



SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/2/99

	Agency Main Menu:
Login	
Main Menu	New Bond Search Bonds Approved Bonds 180+ Pending Bonds Dead Bonds
Contractors	Search Approved Bonds By:
Employees FAQ	Owner/Obligee Search
Documentation	Contractor
<u>Help</u>	Bond Number Search

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This is the main menu. The system has identified the user and the date. From here you can navigate to any part of the system. Look across the horizontal bar. You can enter a new bond, search for an approved bid bond, search for an approved bid bond that is over 180 days old, search for a pending bond, or search for a dead bond.

Let's start by searching for all pending bid bonds. A pending bid bond is a bid bond that has been entered into the system but, is waiting to be approved.

Click on "pending bonds" on the horizontal bar.



Login

Main Menu

Contractors

Employees

FAQ

Documentation

Help

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/1/99

-	Agency l	Pending Bond	ds Search			_
	New Bond		Approved Bonds 180+	Pending Bonds	Dead Bonds	_
	1		Search Pending Bon	ds by:		
	Own	er/Obligee		S	earch	
		Contractor bla	ank for universal	search- S	earch	
	•					

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You will see that the "Pending Bond" section in the horizontal bar is highlighted. You may enter the name of a contractor or owner/obligee and do a specific search. Let's search for all of your pending bonds. (remember that the system knows who you are what bonds you are authorized to view)

To search for all pending bid bonds simply leave the fields blank and click on the "search box" next to the contractor field.

2000 4



Login

Main Menu

Contractors

Employees

<u>FAQ</u>

Documentation

Help

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/2/99

outery Ferium Bonds	s ivienu	-
New Bond Search Bonds	Approved Bonds 180+ Pending Bonds Dead F	Bonds
You may select View/Edit from the	table below: Page 1 of 1	
BidDate Contractor	Owner/Obligee	Surety
2/21/99 ABC CONTRACTING, IT	NC. City of New York Department of Design and Construction	Liberty Mutual Incump
2/22/99 ABC CONTRACTING, IN	NC United States General Services Administration	Liberty Mutual Insurance
Owner/Obligee	Search	
Contractor	Search	

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This is a very valuable tool for the surety agent. As each bid bond is entered into the system for your agency, the bid bond will be listed here in chronological order of bid date. This screen can be used as a daily work list of bid bonds to be approved. The appropriate surety company can see the pending bid bond and accept it as the bid bond request. To the right of the screen is "edit" and "view". (sorry, the printer cannot print items that you must scroll to the right to see on a monitor.)

Let's click edit. (remember, you cannot see "edit" here but, you will be able to see it on your monitor).

http://www.surety2000.com/Agency/EditBond.asp?T1=SNY991001342



Insurance Agency John Doe

3/2/99

•Edit Bond:

Login

Main Menu

Employees

FAQ

Documentation

Help

Contractor Information:

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET

City: ANYWHERE

State: New York

Zip Code: 1111111

Owner/Job Information:

Owner/Obligee: City of New York Department of Design and Construction

Bid Bond Form: AIA Document A310

Address:

City: Long Island City

State: New York

Zipcode: 10031

Bid Date: 2 / 21/ 1999

Estimated Contract Price: optional

Amount of Bid Security: ten percent of bid amount

Contract # or IFB#: 456123

description of project here.

Description of Job:

Still Pending

Approved

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This is a pending bid bond. It is a review of the information as it will appear when it is approved. You can change the bid date, estimated contract price, amount of bid bond, ifb number and the description of the job. Then you can return it into the pending list, approve the bid bond, or send it into the dead file where it cannot return.



SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/1/99

	Enter New Bid Bor	nd Step 1 of 4			•	
Login	Contractor Informatio	n:				
Main Menu	Company Name: al		terretainen eritainen eritainen eritainen eritainen eritainen eritainen eritainen eritainen eritainen eritaine	N	lext >	4
Contractors	Address:	ter and the second of the seco	i i i i ferice i mileta suo centi insi i ci i i i i i i i i i i i i i i i i	arras es e e A lama <u>arras arras ar</u>		فـ
77	City:			•		
Employees	State:					
FAQ	Zip Code:					
<u>Documentation</u>	Owner/Obligee/Job In	formation:		*****	** - ** - * * * * * * * *	
Help	Owner/Obligee:					
	Bid Bond Form:					
	Address:					•
	City:					
	State:				•	
	Zip Code:					
	Bid Date:					
	Estimated Contract Price:					
	Amount of Bid Security:					
	Contract # or IFB#:					
	•					
	Description of Job:					
	Bid Bond Status: App	proved Pending				
		Reset				
			•			

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This is the screen after you click on "new bond". First enter the first few letters of the contractors name in the top field. (if the contractor has not been entered into Surety2000 you will have to enter the contractor information into the system. It's easy and we'll show you later). For this presentation we are using ABC Contracting Inc. Enter abc into the field and click "next".



Login

Main Menu

Contractors

Employees

FAQ

Documentation

Help

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/1/99

Enter New Bid Bond Step 2 of 4

Entry	Conractor Name	Address	he Company Name: Page
1	ABC CONTRACTING,	INC. ANYWHERE,	NY 111-222-3333
	Searc	ch for Contractor	Name:
	Search For:	برسائد التهوية والمحمول والمحمول المحاود المحا	Search

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Surety2000 found the contractor for you. Sometimes Surety2000 will find several contractors for you with similar names. You pick the exact name by clicking on the name. In this case there is only one ABC Contracting Inc. If there was ABC Plumbing, ABC Electrical, etc. you would choose from that selection.

Click on ABC.

http://www.surety2000.com/Agency/newbond3...EET&City=ANYWHERE&State=NY&Zip=1111111+++

6

Main Menu

Contractors

Employees

FAQ

Documentation

<u>Help</u>

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency John Doe

3/2/99

Enter New Bid Bond Step 3 of 4

Login Contractor Information:

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET

City: ANYWHERE

State: NY

Zip Code: 1111111

Surety: Select a Surety Owner/Obligee/Job Information: Owner/Obligee: Bid Bond Form: Select a Bid Bond Form from the list Address: Additional Address: State: New York Zip Code: Bid Date: Estimated Contract Price: Amount of Bid Security: Contract # or IFB# Description of Job: Bid Bond Status: Approved Pending Next >

The contractor's name that you chose is inserted in the field. This will avoid clerical errors. Move down to "surety". The scroll down screen will list all the sureties that have authorized you. They can rescind that authority at any time from their Surety2000 website.

Complete the remaining fields. The estimated contract price is optional. Surety2000 is Year 2000 compliant. (Insert 1999 in the field for year).

http://www.surety2000.com/Agency/newbond3...EET&City=ANYWHERE&State=NY&Zip=1111111+++

:000



<u>Login</u>

Main Menu

Contractors

Employees

FAQ

Documentation

<u>Help</u>

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/2/99

Enter New	Bid	Bond	Step	3	of	4
------------------	-----	-------------	------	---	----	---

Contractor Information:

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET

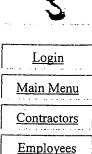
City: ANYWHERE

State: NY Zip Code: 1111111 Surety: Liberty Mutual Insurance Co. Owner/Obligee/Job Information: Owner/Obligee: State of Virginia Department of Transportation Bid Bond Form: Bid Bond in accordance with contract specifications Address: Additional Address: State: Virginia Zip Code: 12345 Bid Date | 02/ 21/ 1999 Estimated Contract Price: optional Amount of Bid Security: ten percent of bid bond not to exceed Contract # or IFB#: 654321 insert job decription here Description of Job: Bid Bond Status: 💽 Approved 🔘 Pending

Complete all the fields remaining. You may pend this bond or approve it. Let's approve this bid bond. Be sure the approved circle is highlighted then click "next"

:000





FAQ

Documentation

<u>Help</u>

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/1/99

Please Verify the information below is correct then Finish.

Date of Bid Bond Entry: 3/1/99 7:08:08 PM

Entered by: John Doe

Surety Name: Liberty Mutual Insurance Co.

NAIC#: 23043

State of Incorporation: MA

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET, ANYWHERE, NY 1111111

Owner/Obligee: State of Virginia Department of Transportation

Address:

Additional Address:

Bid Bond Form: BidBond in accordance with Contract Specifications

Bid Date: 2/21/1999 Contract Price optional

Amount of Bid Security: ten percent of amount bid not to exceed...

Contract # or IFB#: 654321

Description of Job: insert description of project here.

Bid Bond Status: Approved

Finish

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This is a final review of all the information before the bid bond is executed. THE DATE OF THE ENTRY TO THE SECOND IS ARCHIVED. The entry date and time will become the time of execution on the next screen. Note: just as a paper bid bond must be issued on time for a bid letting, a Surety2000 bid bond must be approved prior to the bid letting time. The owner/obligee will take note of this time. The NAIC code is also listed in order to specifically identify the surety.

Review the information and click on "Finish". The next screen is the bid bond.

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Insurance Agency John Doe

3/1/99

<u>Login</u>

Main Menu

Contractors

Employees

<u>FAQ</u>

Documentation

Help

The Following Bond has been Approved

\$2000 Bond ID: SVA991001340

Date of Bid Bond Entry: 3/1/99 7:08:08 PM

Date of Bid: 2/21/99

Date of Bid Bond Approval: 3/1/99 7:11:47 PM

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET, ANYWHERE, NY 1111111

Surety Name: Liberty Mutual Insurance Co.

State of Incorporation: MA

NAIC#: 23043 -

Owner/Obligee: State of Virginia Department of Transportation

Address: , , VA 12345

Amount of Bid Security: ten percent of amount bid not to exceed...

Description of Job: insert description of project here.

Bond Form: BidBond in accordance with Contract Specifications

Contract # or IFB#: 554321 Entered by: John Doe

Print	Bond	
and the firms made an account on		

Owner/Obligee	Search
Contractor	Search

This is your electronic bid bond. The code at the top is the "authorization code". This code must be given to your contractor. The contractor will present this code at the bid letting along with the bid. The owner/obligee will login to Surety2000, insert the "authorization code" and view the bid bond as you see it here.

The surety will be able to view all executed bid bonds by their agents.

You may print this screen and use it to fax the code to your contractor and retain it for your records.

A bid bond can be executed or put into pending by knowledgeable surety personnel in less than ninety seconds.

Surety2000 has been proven to save money, decrease errors, deter fraud, and provide an overall better service to your contractor.

11

http://www.surety2000.com/Agency/ADMIN/ContrNew.asp



Login

Main Menu

Contractors

Employees

FAQ

Documentation

<u>Help</u>

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency John Doe

3/1/99

Enter Contractor	Information	Below
------------------	-------------	--------------

Company Name	abc contracting
Contact Person	ONTIONS
Phone Number	optional
Address	required
.] Citv	required
State	Alabama
Zip Code	required
	Submit

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Complete information that must be reproduced on the bid bond such as complete name and address. Contact person and telephone number is optional. Click "submit" and you can execute their first bond.

http://www.surety2000.com/Agency/ADMIN/Contr.asp

1

Login

Main Menu

Contractors

Employees

FAQ

Documentation

Help

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SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency John Doe

3/1/99

17-19	"News and the second se
- Contractors Menu Search New Contractors	or l
Searc	h for Contractors By:
Company Name	and the same of th
Search For:	Search

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A contractor has to be entered into Surety2000 before a bid bond can be executed. There is no fee for entering a contractor. As you use the system you will enter a contractor when you are entering the first bid bond for that contractor. (You could enter your entire list all at once if you choose.)

Go to the vertical column at the left. Click on "contractors". You can search for an existing contractor or enter "new contractor". Click on "new contractor" and complete the fields on the next screen.

FIGURE 12A

http://www.surety2000.com/Agency/ADMIN/emplList.asp



Login

Main Menu

Contractors

Employees

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency
John Doe

3/1/99

Surety Employee List

Search New Employee

You may select Edit, Add, or Delete from the table below: Page 1 of 1

Surety AgentUser NamePhoneAction...John DoeInsurance555-555-555Edit... Delete

<u>FAQ</u>

<u>Documentation</u>

Help

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You can grant employees power of attorney. A surety must enter your agency first and empower one person and grant that person administration ability. That individual can enter or delete powers from employees.

Use the vertical bar at the left. Click "employees". Click "new employees" on the horizontal bar.

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

Insurance Agency John Doe

3/1/99

Enter Employee Information Below 7995

Login

Main Menu

Contractors

Employees

FAQ

Documentation

Help

Employee Name	John Doe
Address	Broadway
City	Anywhere
State	NY
Zip Code	121212
Phone Number	555-555-5555
Login Name	Insurance
Password	
Verify Password	***
Admin Access	V
Enabled	V
ಚಿಸ್ ಅ	Submit Reset

©1997 AAWS Web Services

Complete the fields. Allow the employee to enter their own password. Decide if you want to pass on the administration ability or not. Click "submit" and that employee can login to Surety2000. You can enter this section, search for an employee and "unauthorize" within seconds.

A password cannot be retrieved by anyone or even Surety2000. If a password is forgotton a new password must be submitted.



SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

<u>Login</u>	
Introduction	
<u>Jobs</u>	
<u>News</u>	
Documentation	
FAQ	

<u>Help</u>

Fenter your login information and push the Login button. You must have a valid user name and password to access the system!

User Name: Illinois Password: **** Login

Authorized access only!
Do NOT give your user information to ANYONE!

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This is the login page. You will need a user name and password. Each owner/obligee will be given one user name by Surety2000. That person will choose a password and also decide who will be able to use the system within their agency. An owner/obligee can only *view* executed bid bonds. No changes or transactions can be made.

We have used the State of Illinois Department of Transportation for the purposes of this presentation. The user name and password are entered and then click next.

http://www.surety2000.com/Owner/MainMenu.asp



SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

State of Illinois Department of Transportation Jeff Heck

3/3/99

Login Page
Main Menu
<u>Jobs</u>
News
Documentation
FAQ

<u>Help</u>

·
Bid Bonds Approval Tracking System.
ns from the panel on the left or us the search feature below.
base by leaving the search field empty.
ay refer to the Help button for instuction at anytime.

Search Bonds By:

	Bond	F	Submit
--	------	---	--------

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This is the owner main menu. At the bid letting contractors will present "authorization codes". Simply insert the code in the "bond number" field and click submit. The code begins with "s". (surety). The next two letters are the State (il. Illinois). The next two numbers are the year the bond was executed (99). The remaining numbers are unsequenced and selected by the Surety2000 server.



Login Page

Main Menu

Jobs

Documentation

<u>FAQ</u>

<u>Help</u>

SURETY 2000 BID BOND MANAGER Bid Bond Approval System Version 1.0

State of Illinois Department of Transportation Jeff Heck

3/3/99

The Following Bond has been Executed

S2000 Bond ID: SIL991001343

Date of Bid Bond Approval: 3/3/99 2:55:22 PW

Contractor: ABC CONTRACTING, INC.

Address: 100 SMITH STREET, ANYWHERE, NY 1111111

Surety Name: Reliance Surety Company

State of Incorporation: PA

NAIC#: 41980

Owner/Obligee: State of Illinois Department of Transportation

Address: , , iL 12345

Amount of Bid Security: ten percent of bid amount not to exceed...

Description of Job: insert description of job here...

Bond Form: BidBond in accordance with Contract Specifications

Contract # or IFB#: 456123

Entered by:

Executed by: Joseph V. Sforzo

Search Bonds By:

Bond	Number:	The state of the s	AN			
	¥	•	e	*:	Submit	

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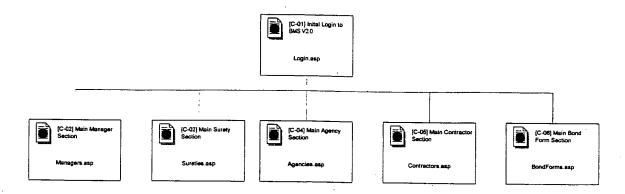
This is the electronic Surety2000 bid bond. The exact date and time of the bid bond approval is archived. The name of the surety and the NAIC code is submitted. This code designates the exact surety and avoids the confusion of similar surety names. The name of the person who executed the bid bond is at the very bottom.

All information that is inserted in bid bond forms is presented here. The bid bond form is herein agreed that it is the form within the specification.

This screen can be printed and retained.

Simply insert the next authorization code in the bond number field and click submit to view the next bid bond.

BMS V2 Major Navigation Areas

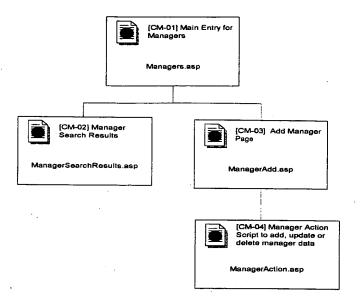


BMS Login Form

CompanyID:	
Username:	
Password:	

Log

Manager Feature Section Layout



REPUTCEMENT SHEET

Company Name:			
Contact Person:	Phone Nu	ımber:	-
Address:	. I		
City:			
State / Province: State or Province	Zip:	Country:	Ž
	Add		

Surety Feature Section Layout

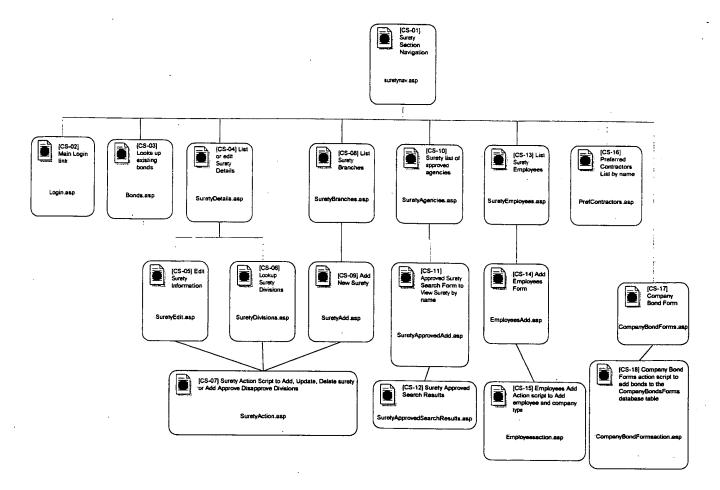


FIGURE 22

Company Name:		···			
Contact Person:			Phon	e Number	<u>. </u>
Address:		·	j.		
		•	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
City:					
State / Province:		Zip) <u>:</u>	Country:	×
State Of Incorporation	\$		NAIC	Number:	
CONTRACT	Up	date			

Division:			
Address:			
City			
City:	· · · · · · · · · · · · · · · · · · ·		
State / Province:	Zip:	Country:	Ž
State Of Incorporation	NAIC	Number:	
Add			

Company Name:	
Contact Person:	Phone Number:
Address:	
City:	
State / Province:	Zip: Country:
State Of Incorporation	NAIC Number:
1	Add

First Name	Last Name	
Title		
Address		
City:		
	·	
State / Province:	Zip: Country:	
	7	
Phone	Permissions	
	os. Ma	
Username: Password:	Verify Password:	
.		
	Add	

REPURCEMENT SHEET

Agency Feature Section Layout

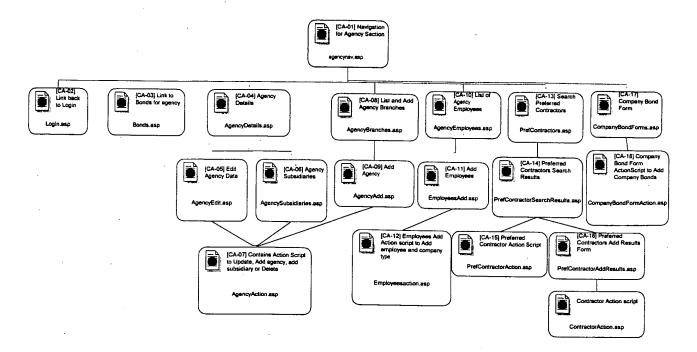


FIGURE 27

Company Name:			
Contact Person:	Phone N	lumber:	
Address:			
City:			
State / Province:	Zip:	Country:	
	Update	ı	Ž

Subsidiary:			
Address:			•
City:			
State / Province:	Zip:	Country:	
	s Ar ∑s		
	Add		

First Name	Last Name
Title	-
Address	
1	
City:	
State / Province:	Zip: Country:
Phone	Permissions
Username: Password:	Verify Password:
	Add

REPURCEMENT SHEET

Add Preferred Contractor: To add to your list of	preferred contractors, search for the
contractor you wish to add using the form below.	
Federal Tax ID:	Sear

Contractor Feature Section Layout

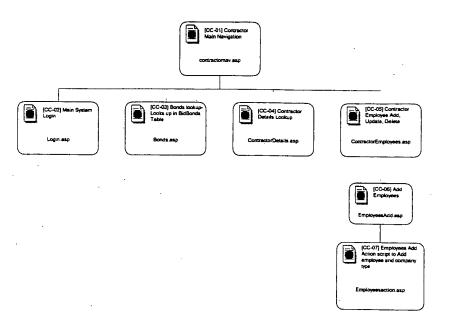


FIGURE 32

Company Name:			
Tax ID Number:	Phone N	umber:	
Address:	l		
City:	<u> </u>		
State / Province:	Zip:	Country:	
	. Add³	,	Andrea (

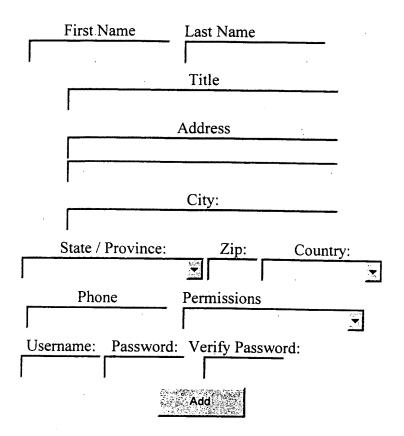


FIGURE 34

REPURCEMENT SHEET

Owner Feature Section Layout

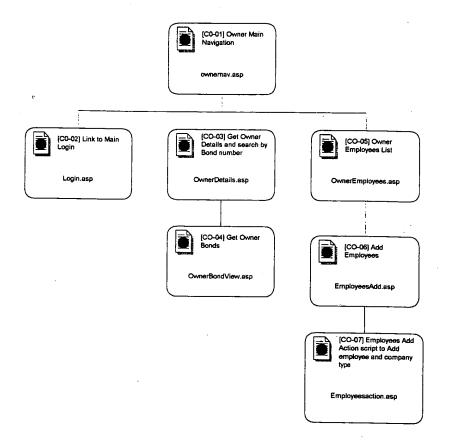


FIGURE 35

First Name	Last Name	
Title		
Address		
City:		
State / Province:	Zip: Country:	
	X	
Phone	Permissions	
		X
Username: Password:	Verify Password:	
Add		

Bond Feature Section Layout

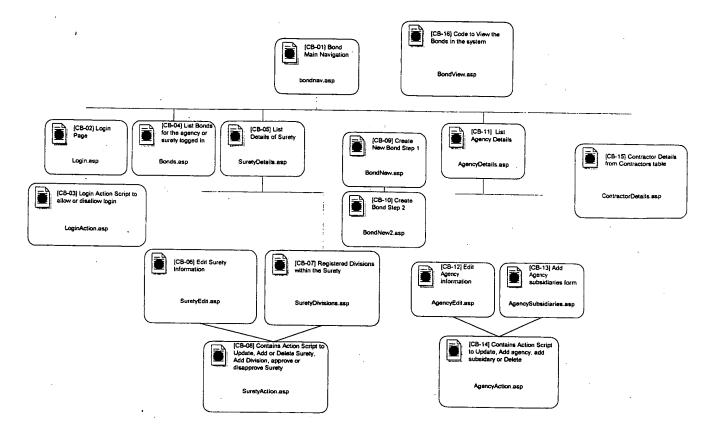


FIGURE 37

Form used to update existing surety information. The update form appears below.

Company Name:

Contact Person:

Phone Number:

City:

City:

State / Province:

State Of Incorporation

NAIC Number:

Update

Division:			
Address:			
City:			
State / Province:	Zip:	Country	
	24	Country:	<u>.</u>
State Of Incorporation			
	Add		

REPUTCEMENT SHEET

Contains form to update Agency	information. The	form used appears below
Company Name:		
Contact Person:	Phone Nu	mber:
Address:		····
	<u> </u>	
1		
City:		
State / Province:	Zip:	Country:
	Update	

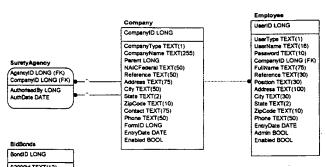
REPURCEMENT SHEET

The add subsidiaries form appears below:

Subsidiary:			
Address:			
City:			
State / Province:	Zip:	Country:	. *.
	Add	1	

XSuretyAgency

AgencyID LONG CompanyID LONG AuthorisedBy LONG AuthDate DATE



dtproperties
id LONG
property TEXT(64)
objectid LONG
value TEXT(255)
Natue MEMO
version LONG

us TEXT(1)

BondiD LONG

520000 TEXT(12)

Condistants TEXT(1)

Condistants TEXT(1)

Condistants TEXT(1)

Condistants TEXT(1)

Condistants TEXT(1)

Condistants TEXT(1)

Condistants DATE

Bildbate DATE

Bildbate DATE

Bildbate DATE

Bildbate DATE

Bildbate DATE

Contended LONG (FK)

Surbype LONG

Surbype LONG

Contender LONG (FK)

SubSurey(1) LONG

Contender LONG (FK)

JobAud? TEXT(75)

JobAud? TEXT(75)

JobCater TEXT(75)

Contract TEXT(76)

Contract TEXT(76)

FormType

FormID LONG FormCode TEXT(50) FormDescription TEXT(250)

XCompany

CompanyID LONG
CompanyIype TEXT(1)
CompanyName TEXT(30)
Parent LONG
NAICFederal TEXT(30)
Reference TEXT(30)
Address TEXT(30)
City TEXT(30)
State TEXT(2)
ZipCode TEXT(10)
Contact TEXT(20)
Prom TEXT(20)
FormID LONG
EntryOpe

XBidBond

BondiD LONG
S2000id TEXT(12)
BondStatus TEXT(1)
BondStatus TEXT(1)
DateEntered DATE
UpdateDate DATE
UpdateDate DATE
BidDate DATE
EnteredBy LONG
Surely LONG
Surely LONG
Surely LONG
Surely LONG
Contractor LONG
Contractor LONG
Contractor LONG
JobAdd TEXT(40)
JobSadd TEXT(40)
JobSadd TEXT(40)
JobSadt TEXT(10)
JobPadd TEXT(10)
JobPa

XEmployee

7,54

UserID LONG
UserType TEXT(1)
UserName TEXT(16)
UserName TEXT(16)
Password TEXT(10)
CompanyID LONG
FullName TEXT(30)
Reference TEXT(30)
Address TEXT(30)
Cary TEXT(30)
State TEXT(30)
Cary TEXT(30)
Phone TEXT(20)
Phone TEXT(20)
EntryDate OATE
Admin BOOL
Enabled BOOL